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CURRENT SERIAL RECORDS

EUROPEAN CITRUS IMPORTS AND
U.S. CITRUS TRADE, 1967-68 SEASON

The Western European Market for Fresh Citrus

Oranges (including tangerines).--The 12 Western European countries listed in table 1 imported 83.6 million boxes of oranges in 1968, nearly 1.3 million less than in the previous year and 5.6 million below the 1966 level. This was the smallest amount imported since 1963.

The largest decline took place in France, the second most important market, where imports dropped 2.1 million boxes. Gains were registered in 7 of the 12 countries.

Several factors combined to reduce consumption of fresh oranges in 1968. Three of the most important were: reduced crops in the Mediterranean area and the United States, large crops of domestically produced deciduous fruits, and distribution problems. The latter were caused by late-maturing crops and weather disturbances. At certain times major markets were oversupplied and prices depressed, thus forcing producers to withhold some export quality fruit.

Imports received from Spain--the largest Mediterranean exporter--dropped again, and were almost 10 million boxes below the 1966 level. Performance by other countries was mixed, with Israel showing a substantial gain, the fourth consecutive increase. The United States showed the most dismal performance, supplying only 319,000 boxes compared to 2.6 million in 1967.

Lemons.--Every country listed in table 2, with the exception of Italy and Finland, imported more lemons in 1968. Total imports reached 10.4 million boxes, 3 percent above 1967. This was the fifth straight year that imports have been near the 10-million-box level. West Germany and France together imported 65 percent of the total, while Italy, the world's largest producer and exporter of lemons, supplied 62 percent of all imports. The United States and Spain, the second and third most important sources, respectively, both provided less competition in 1968 because of smaller crops.

Grapefruit.--Imports of fresh grapefruit continued upward, with the total increasing to 7.8 million boxes, 15 percent above the 1967 level. The three major importers--the United Kingdom, West Germany, and France--all increased imports and received 78 percent of the total shown in table 3. Israel has been the major beneficiary of this expansion in grapefruit consumption and accounted for 59 percent of total imports in 1968, double the volume supplied 5 years ago. Imports from Cyprus have also doubled in 5 years, but the volume remains far below that from Israel. Imports from South Africa and the United States, the second and third most important suppliers in 1967, declined in 1968.

The Western European Market for Citrus Juices

The importation of citrus juices maintained its upward trend as evidenced by the performance of the individual countries listed in tables 4-11. Only two of the eight markets registered a decline for the time period shown, although imports of some specific commodities in several countries were below the level of the previous year. The United States and Israel were the most important suppliers of citrus juices.

The United Kingdom and West Germany remain the most important importers of citrus juices. In the United Kingdom gains were registered in both the single-strength orange and grapefruit juice categories, but imports of concentrated orange juice declined after four consecutive seasons of increases. Overall, less citrus juice was imported than during the previous season. Israel was once again the major supplier of juices to the United Kingdom. Imports from the United States declined.

Total West German imports of citrus juices recorded a substantial increase. Imports of orange juice were up slightly while imports of other citrus juices jumped $1\frac{1}{2}$ times. Grapefruit juice shipments were down, largely because of a sharp drop in imports from the United States. Several countries were prominent suppliers of citrus juices, but the Netherlands replaced Israel as the most important.

France also imported more citrus juice, especially unsweetened orange juice. The United States registered the largest increase in the latter category, but Morocco replaced the United States as the most important supplier of total citrus juices.

Sweden moved into position as the fourth most important market as imports doubled the previous season's total. The United States was the primary factor behind this increase, with shipments 3 times larger than the preceding year.

Other countries importing more citrus juices included Austria, Belgium, and the Netherlands, while Denmark received less. The United States was the leading supplier to all but Austria.

U.S. Fresh Citrus Exports

The 1967-68 citrus crop was relatively large by historical standards but below the previous year's level for all three major categories. Exports of fresh oranges and grapefruit could not keep pace with the previous year's performance. Only lemons managed to continue an upward trend. U.S. exports of fresh citrus are shown in tables 12-14

Exports of oranges plummeted to 4.6 million boxes from 9.8 million in 1966-67. All areas of destination received fewer oranges, with Canada, the largest single market, suffering the largest decline. U.S. participation in the highly competitive European market dropped sharply, with shipments totaling only 300,000 boxes compared with more than 3.1 million in 1966-67.

U.S. exports of lemons rose to 3.5 million boxes, up 80,000 boxes from a year earlier, despite the shorter crop. The growth of the Japanese market continued to spark the expansion of U.S. exports, receiving 1.1 million boxes in 1967-68. Exports to France, the second largest market, totaled 633,000 boxes down 12 percent from 1966-67. In general, shipments during the summer marketing season have increased recently while winter exports have declined.

Grapefruit exports dropped from 3.3 million boxes in 1966-67 to 2.3 million in 1967-68. Virtually every market received less American grapefruit, with shipments to Canada, by far the most important market, suffering the largest decline. Exports to Europe were also down substantially.

U.S. Processed Citrus Exports

Among the major processed citrus items, only shipments of single-strength orange juice managed to increase in 1967-68. Exports reached a record 13.2 million gallons, more than double the performance two seasons earlier. Despite a drop in shipments to Canada, the largest single market, exports to Europe improved substantially. Single-strength grapefruit juice exports declined to 4.5 million gallons from 5.4 million in 1966-67 largely because of reduced shipments to Europe. Exports of frozen orange juice concentrate declined slightly to 4.2 million gallons as both Europe and Canada received less of this commodity. Substantially less hot pack orange juice concentrate and orange oil were exported in 1967-68, but shipments of grapefruit sections increased slightly. U.S. exports of citrus products are shown in table 15.

U.S. Citrus Imports

The drop in the U.S. orange and tangerine crop in 1967-68 resulted in a large increase in imports of oranges (including tangerines) and orange juice concentrate. Statistics for the first category show an increase from 410,000 boxes in 1966-67 to 2.1 million in 1967-68. Mexico supplied 83 percent of the total and Israel accounted for almost all of the remainder. Imports of orange juice concentrate jumped from 2.9 million gallons (single-strength equivalent) to 11.8 million in 1967-68. Brazil supplied 93 percent of the total. U.S. imports of fresh and processed citrus are shown in table 16.

Table 1.--Oranges (including tangerines), Fresh: Imports into Western Europe from Specified Countries, 1966-68

Importing Country	Country of Origin									
	Algeria	Brazil	Israel	Italy	Morocco	South Africa	Spain	United States	Other	TOTAL
	thousand boxes (70 pounds)									
<u>EC</u>										
<u>Belgium:</u>										
1966.....	---	---	616	10	18	274	2,540	599	497	4,554
1967.....	---	---	770	19	14	252	2,408	755	356	4,574
1968.....	---	---	761	6	249	429	2,337	135	614	4,531
<u>France:</u>										
1966.....	4,299	185	600	12	6,968	1,706	10,003	204	977	24,954
1967.....	2,885	305	830	71	6,888	1,611	8,871	431	1,261	23,153
1968.....	2,002	231	1,054	47	6,556	1,794	8,431	18	907	21,040
<u>West Germany:</u>										
1966.....	564	455	2,945	1,594	2,688	1,118	15,617	68	840	25,889
1967.....	325	458	3,749	1,859	2,526	1,292	12,536	97	999	23,841
1968.....	314	383	4,581	1,738	2,919	1,183	11,376	2	1,296	23,792
<u>Italy: 1/</u>										
1966.....	---	---	---	---	---	---	---	---	---	---
1967.....	---	---	---	---	---	---	---	---	1	1
1968.....	---	---	---	---	---	---	---	---	2	2
<u>Netherlands:</u>										
1966.....	59	764	857	76	550	409	3,172	634	708	7,229
1967.....	156	857	1,146	127	610	314	2,860	762	703	7,535
1968.....	239	588	1,838	48	851	736	2,600	138	993	8,031
<u>Total EC:</u>										
1966.....	4,922	1,404	5,018	1,692	10,224	3,507	31,332	1,505	3,022	62,626
1967.....	3,366	1,620	6,495	2,076	10,038	3,469	26,675	2,045	3,320	59,104
1968.....	2,555	1,202	8,234	1,839	10,575	4,142	24,744	293	3,812	57,396
<u>Other Europe</u>										
<u>Austria:</u>										
1966.....	---	29	465	864	1	95	436	5	551	2,446
1967.....	2	57	666	765	4	90	284	4	685	2,557
1968.....	---	28	711	753	18	99	186	2	812	2,609
<u>Denmark:</u>										
1966.....	---	59	681	9	30	45	641	36	16	1,517
1967.....	1	52	607	9	87	65	454	53	20	1,348
1968.....	1	47	565	8	36	54	532	5	70	1,318
<u>Finland:</u>										
1966.....	*	21	658	19	97	129	276	6	96	1,302
1967.....	---	11	729	16	83	155	276	1	69	1,340
1968.....	6	36	675	13	91	143	195	---	138	1,297
<u>Norway:</u>										
1966.....	---	19	399	---	222	141	896	202	39	1,918
1967.....	*	9	411	6	190	130	706	194	52	1,698
1968.....	8	19	440	6	409	244	686	10	91	1,913
<u>Sweden:</u>										
1966.....	1	93	1,099	456	241	84	1,562	95	8	3,639
1967.....	1	83	1,160	441	264	65	1,305	101	12	3,432
1968.....	42	49	1,193	506	198	36	1,240	5	180	3,449
<u>Switzerland:</u>										
1966.....	4	68	439	1,155	13	63	1,164	14	149	3,069
1967.....	12	89	503	1,150	22	88	922	1	112	2,899
1968.....	13	70	549	1,312	14	75	827	*	167	3,027
<u>United Kingdom:</u>										
1966.....	---	486	3,748	2	745	2,946	3,947	77	715	12,666
1967.....	---	634	4,215	2	869	3,151	2,563	217	818	12,469
1968.....	---	456	4,990	1	996	3,118	2,200	4	816	12,581
<u>Grand Total:</u>										
1966.....	4,927	2,179	12,507	4,197	11,573	7,010	40,254	1,940	4,596	89,183
1967.....	3,382	2,555	14,786	4,465	11,557	7,213	33,185	2,616	5,088	84,847
1968.....	2,625	1,907	17,357	4,438	12,337	7,911	30,610	319	6,086	83,590

* Less than 500 boxes. 1/ Country of origin not identified.

Table 2.--Lemons, Fresh: Imports into Western Europe
from Specified Countries, 1966-68

Importing Country	Country of Origin								TOTAL
	Cyprus	Greece	Israel	Italy	South Africa	Spain	United States	Other	
	thousand boxes (76 pounds)								
<u>EC</u>									
<u>Belgium:</u>									
1966.....	---	---	25	124	---	---	253	53	455
1967.....	---	52	---	101	---	---	255	51	459
1968.....	---	65	---	133	---	---	231	68	497
<u>France:</u>									
1966.....	106	109	137	842	63	624	684	103	2,668
1967.....	88	163	110	755	29	739	751	95	2,730
1968.....	224	180	112	990	13	483	715	71	2,788
<u>West Germany</u>									
1966.....	1	4	2	3,289	10	486	71	153	4,016
1967.....	1	10	2	3,044	10	488	76	224	3,855
1968.....	10	29	---	3,375	6	336	72	149	3,977
<u>Italy:</u>									
1966.....	---	---	---	---	---	---	---	---	---
1967.....	---	---	---	---	---	---	---	---	---
1968.....	---	---	---	---	---	---	---	---	---
<u>Netherlands:</u>									
1966.....	---	20	11	95	---	12	136	12	286
1967.....	8	23	16	87	---	11	132	13	290
1968.....	12	16	23	130	1	4	157	24	367
<u>Total EC:</u>									
1966.....	107	133	175	4,350	73	1,122	1,144	321	7,425
1967.....	97	248	128	3,987	39	1,238	1,214	383	7,334
1968.....	246	290	135	4,628	20	823	1,175	312	7,629
<u>Other Europe</u>									
<u>Austria:</u>									
1966.....	---	24	2	639	2	*	43	2	712
1967.....	---	32	2	612	7	*	43	4	700
1968.....	*	31	1	636	12	1	35	6	722
<u>Denmark:</u>									
1966.....	2	---	41	98	3	2	54	5	205
1967.....	2	1	32	80	4	3	69	11	202
1968.....	4	2	34	80	1	2	74	7	204
<u>Finland:</u>									
1966.....	3	---	16	21	6	2	39	1	88
1967.....	1	2	22	25	9	1	41	2	103
1968.....	---	---	19	29	11	---	33	7	99
<u>Norway:</u>									
1966.....	2	---	4	---	2	---	59	8	75
1967.....	1	*	5	6	3	2	51	3	71
1968.....	3	---	8	3	2	1	55	1	73
<u>Sweden:</u>									
1966.....	3	---	19	45	1	3	98	---	169
1967.....	2	---	23	28	3	4	110	5	175
1968.....	1	---	33	20	1	*	127	3	185
<u>Switzerland:</u>									
1966.....	2	1	10	458	1	30	27	4	533
1967.....	---	8	3	441	---	39	23	4	518
1968.....	---	3	2	464	1	18	31	4	523
<u>United Kingdom:</u>									
1966.....	107	9	63	569	108	15	58	42	971
1967.....	125	3	63	542	100	26	83	41	983
1968.....	155	1	75	594	69	11	49	45	999
<u>Grand Total:</u>									
1966.....	226	167	330	6,180	196	1,174	1,522	383	10,178
1967.....	228	294	278	5,721	165	1,313	1,634	453	10,086
1968.....	409	327	307	6,454	117	856	1,579	385	10,434

* Less than 500 boxes.

Table3.--Grapefruit, Fresh: Imports into Western Europe
from Specified Countries, 1966-68

Importing Country	Country of Origin							TOTAL
	Cyprus	Honduras	Israel	Morocco	South : Africa	United : States	Other	
	thousand boxes (80 pounds)							
<u>EC</u>								
<u>Belgium:</u>								
1966.....	---	---	194	---	---	65	12	271
1967.....	---	---	204	---	---	77	30	311
1968.....	---	---	244	---	---	---	89	333
<u>France:</u>								
1966.....	28	15	585	35	125	251	94	1,133
1967.....	24	10	652	65	185	278	85	1,299
1968.....	23	25	1,029	25	132	134	119	1,487
<u>West Germany:</u>								
1966.....	145	105	822	55	269	128	149	1,673
1967.....	210	68	860	23	313	109	147	1,730
1968.....	265	67	1,315	1	245	21	137	2,051
<u>Italy:</u>								
1966.....	---	---	80	---	---	---	14	94
1967.....	---	---	91	---	35	---	9	135
1968.....	---	---	150	---	---	---	32	182
<u>Netherlands:</u>								
1966.....	5	46	196	---	6	130	148	531
1967.....	9	7	184	5	3	92	132	432
1968.....	18	36	314	---	2	67	143	580
<u>Total EC:</u>								
1966.....	178	166	1,877	90	400	574	417	3,702
1967.....	243	85	1,991	93	536	556	403	3,907
1968.....	306	128	3,052	26	379	222	520	4,633
<u>Other Europe</u>								
<u>Austria:</u>								
1966.....	---	---	41	*	6	9	2	58
1967.....	1	*	52	*	14	4	5	76
1968.....	3	---	61	---	10	1	7	82
<u>Denmark:</u>								
1966.....	7	17	47	*	7	14	9	101
1967.....	10	12	52	1	6	14	6	101
1968.....	11	22	43	*	6	3	7	92
<u>Finland:</u>								
1966.....	1	1	46	---	7	5	1	61
1967.....	*	*	46	---	9	4	1	60
1968.....	4	2	44	---	10	2	3	65
<u>Norway:</u>								
1966.....	3	---	20	---	7	13	1	44
1967.....	2	*	17	---	6	13	1	39
1968.....	2	---	19	---	6	8	2	37
<u>Sweden:</u>								
1966.....	5	*	63	---	6	44	7	125
1967.....	1	1	70	---	3	46	6	127
1968.....	1	1	68	---	8	26	9	113
<u>Switzerland:</u>								
1966.....	18	*	141	---	18	30	8	215
1967.....	17	---	197	---	24	31	22	291
1968.....	29	---	186	---	23	8	7	253
<u>United Kingdom</u>								
1966.....	318	---	825	26	477	15	450	2,111
1967.....	408	---	773	29	487	40	497	2,234
1968.....	473	---	1,152	13	525	5	392	2,560
<u>Grand Total:</u>								
1966.....	530	184	3,060	116	928	704	895	6,417
1967.....	682	98	3,198	123	1,085	708	941	6,835
1968.....	829	153	4,625	39	967	275	947	7,835

* Less than 500 boxes.

Table 4.--Austria: Imports of citrus juices,
by countries of origin, 1962-63 to 1967-68

Item and Country of Origin	Year beginning October 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>ORANGE JUICE,</u> <u>CONCENTRATED</u> <u>1/</u>						
United States.....	11.5	25.4	4.3	30.2	58.0	189.2
Germany, West.....	23.4	34.0	23.8	25.4	59.4	5.7
Israel.....	39.0	57.6	195.8	120.8	44.1	140.6
Italy.....	96.6	141.2	158.6	93.0	77.1	18.9
South Africa.....	.3	6.4	30.2	4.5	33.0	4.0
Spain.....	33.3	75.0	47.7	77.8	60.7	64.5
Other.....	4.7	63.4	19.6	60.3	102.5	48.9
TOTAL.....	208.8	403.0	480.0	412.0	434.8	471.8
<u>ORANGE JUICE,</u> <u>SINGLE-STRENGTH</u> <u>1/</u>						
United States.....	148.8	74.8	90.5	112.3	361.8	941.3
Brazil.....	<u>2/</u>	24.5	67.4	72.5	69.4	42.2
Germany, West.....	202.1	254.0	287.3	436.8	213.8	227.2
Greece.....	29.6	42.7	229.5	162.3	163.1	177.3
Israel.....	1,215.5	910.5	1,061.1	1,087.9	1,276.7	1,914.1
Italy.....	259.0	201.2	203.3	255.0	261.3	1,319.0
South Africa.....	.3	36.6	112.7	114.3	27.1	117.0
Spain.....	23.9	57.5	82.6	70.4	86.4	53.1
Other.....	40.2	120.3	58.5	47.0	190.4	691.9
TOTAL.....	1,919.4	1,722.1	2,192.9	2,358.5	2,650.0	5,483.1

1/ Includes an unknown quantity of lemon juice.

2/ If any, included under "other".

Table 5.--Belgium: Imports of citrus juices,
by countries of origin, 1963 to 1968

Item and Country of Origin	Calendar Year					
	1963	1964	1965	1966	1967	1968
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>CITRUS JUICES (All)</u>						
United States.....	898	513	544	591	1,610	3,009
Greece.....	1/	514	546	389	389	523
Israel.....	506	886	800	845	987	1,448
Morocco.....	163	1/	49	152	129	1/
South Africa.....	1/	323	83	259	1/	422
Spain.....	121	343	264	227	1/	167
Other.....	555	745	458	2/1,258	3/1,629	1,942
TOTAL.....	2,243	3,324	2,744	3,721	4,744	7,511

1/ If any, included under "other".

2/ Includes 203 metric tons from Argentina and 231 metric tons from Brazil.

3/ Includes 121 metric tons from Argentina and 271 metric tons from Brazil.

Table 6.--Denmark: Imports of citrus juices,
by countries of origin, 1962-63 to 1967-68

Item and Country of Origin	Year beginning July 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>CITRUS JUICES (All)</u>						
United States.....	1,108	284	320	287	2,201	2,953
Brazil.....	1/	1/	1/	225	226	428
Greece.....	473	783	1,192	1,599	1,217	449
Israel.....	696	691	648	938	707	1,069
Italy.....	246	279	258	368	337	177
Spain.....	1,039	516	467	479	379	333
United Kingdom.....	139	141	319	175	110	58
Other.....	121	99	224	214	1,071	397
TOTAL.....	3,822	2,793	3,428	4,285	6,248	5,864

1/ If any, included under "other".

Table 7.--France: Imports of citrus juices,
by countries of origin, 1963 to 1968

Item and Country of Origin	Calendar Year					
	1963	1964	1965	1966	1967	1968
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>ORANGE JUICE, UNSWEETENED</u>						
United States.....	1/	1/	1/	374	2,779	5,328
Algeria.....	714	364	240	1,048	1,167	360
Greece.....	26	79	812	649	157	303
Israel.....	162	123	224	312	863	1,520
Morocco.....	1,036	1,583	1,357	1,745	3,043	5,525
Other.....	59	145	99	181	121	511
TOTAL.....	1,997	2,294	2,732	4,309	8,130	13,547
<u>ORANGE JUICE, SWEETENED</u>						
United States.....	5	1/	1/	35	1,083	436
Algeria.....	2,678	1,175	122	841	2,036	899
Israel.....	77	46	195	464	1,092	943
Morocco.....	2,459	3,163	2,877	2,995	956	1,536
Other.....	65	92	480	280	129	141
TOTAL.....	5,284	4,476	3,674	4,615	5,296	3,955
<u>LEMON JUICE, CONCENTRATED</u>						
Algeria.....	28	11	1/	56	43	1/
Italy.....	153	242	348	255	518	409
Other.....	39	7	27	47	33	80
TOTAL.....	220	260	375	358	594	489
<u>GRAPEFRUIT JUICE (All)</u>						
United States.....	3,104	1,395	3,713	1,941	5,740	3,593
Algeria.....	457	517	16	971	1,205	392
Israel.....	136	749	2,224	2,718	3,507	3,705
Morocco.....	2,319	3,300	2,929	2,953	2,610	4,183
Other.....	33	243	56	18	91	45
TOTAL.....	6,049	6,204	8,938	8,601	13,153	11,918

1/ If any, included under "other".

Table 8.--Netherlands: Imports of citrus juices,
by countries of origin, 1963 to 1968

Item and Country of Origin	Calendar Year					
	1963	1964	1965	1966	1967	1968
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
CITRUS JUICES (All)						
United States.....	1,568	685	487	778	2,194	2,589
Argentina.....	<u>1</u> /	41	45	148	202	126
Belgium-Luxembourg..	76	167	243	546	685	1,012
Brazil.....	<u>1</u> /	<u>1</u> /	17	391	1,176	2,111
Germany, West.....	15	83	180	1,295	1,555	1,444
Greece.....	23	202	240	95	295	144
Israel.....	665	1,360	2,055	2,462	3,206	2,259
Italy.....	518	490	424	712	955	1,118
Jamaica.....	159	96	223	186	60	69
Mexico.....	<u>1</u> /	30	20	30	<u>1</u> /	<u>1</u> /
Morocco.....	16	292	447	230	260	322
Mozambique.....	120	62	112	166	48	282
South Africa.....	172	482	487	549	528	347
Spain.....	673	659	700	777	1,355	956
Other.....	98	181	238	139	234	283
TOTAL.....	4,103	4,830	5,918	8,504	12,753	13,062

1/ If any, included under "other".

Table 9.--Sweden: Imports of citrus products,
by country of origin, 1963 to 1968

Item and Country of Origin	Calendar Year					
	1963	1964	1965	1966	1967	1968
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>CITRUS JUICES (All)</u>						
<u>UNSWEETENED</u>						
United States.....	1,982	1,015	1,232	1,733	4,252	12,918
Greece.....	444	402	420	360	269	72
Israel.....	1,579	3,120	3,632	3,756	3,400	4,572
Italy.....	676	416	396	216	285	241
South Africa.....	396	312	175	175	137	91
Spain.....	404	533	200	540	578	894
Other.....	325	221	406	1/887	990	1,196
TOTAL.....	5,806	6,019	6,461	7,667	9,911	19,984
<u>CITRUS JUICES (All)</u>						
<u>SWEETENED</u>						
United States.....	124	66	70	50	46	44
Israel.....	2/	17	21	25	11	2/
Other.....	25	50	31	30	24	27
TOTAL.....	149	133	122	105	81	71
<u>CANNED CITRUS SECTIONS</u>						
United States.....	18	15	20	19	20	16
Mainland China.....	104	74	111	142	37	81
Israel.....	9	12	14	96	97	135
Japan.....	940	932	1,270	1,202	1,038	818
Spain.....	10	2/	30	140	19	59
Taiwan.....	57	140	32	2/	5	2/
Other.....	36	7	11	73	79	27
TOTAL.....	1,174	1,180	1,488	1,672	1,295	1,136

1/ Includes 296 metric tons from Argentina and 150 metric tons from Brazil.

2/ If any, included in "other".

Table 10.--United Kingdom: Imports of citrus products
by countries of origin, 1962-63 to 1967-68

Item and Country of Origin	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	U.S.	U.S.	U.S.	U.S.	U.S.	U.S.
	Gallons	Gallons	Gallons	Gallons	Gallons	Gallons
<u>ORANGE JUICE,</u>						
<u>CONCENTRATED, UNSWEETENED</u>						
United States.....	1/	1/	64	181	448	437
British Honduras....	162	95	161	286	281	323
Israel.....	196	348	605	549	1,031	814
Italy.....	111	122	50	90	96	23
Jamaica.....	227	183	249	228	229	207
South Africa.....	210	279	174	287	345	292
Spain.....	148	192	209	177	248	180
Other.....	121	201	204	192	224	154
TOTAL.....	1,175	1,420	1,716	1,990	2,902	2,430
<u>ORANGE JUICE,</u>						
<u>SINGLE-STRENGTH 2/</u>						
United States.....	125	1/	17	11	192	20
British Honduras....	751	630	538	554	344	430
Israel.....	2,361	3,548	3,284	3,153	3,783	4,504
Italy.....	3	15	33	280	50	21
Jamaica.....	79	26	67	486	21	51
South Africa.....	348	453	521	408	275	483
Spain.....	454	674	415	500	898	507
Trinidad.....	439	535	503	34	589	454
Other.....	211	395	281	130	191	130
TOTAL.....	4,771	6,276	5,659	5,556	6,343	6,600
<u>GRAPEFRUIT JUICE,</u>						
<u>CONCENTRATED, UNSWEETENED</u>						
British Honduras....	4	9	19	2	11	4
Israel.....	17	43	39	29	52	156
Jamaica.....	72	46	67	79	49	46
South Africa.....	17	36	41	72	7	6
Other.....	5	3	9	15	52	55
TOTAL.....	115	137	175	197	171	267

Continued . . .

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Table 10.--United Kingdom: Imports of citrus products,
by countries of origin, 1962-63 to 1967-68

Item and Country of Origin	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	U.S.	U.S.	U.S.	U.S.	U.S.	U.S.
	Gallons	Gallons	Gallons	Gallons	Gallons	Gallons
<u>GRAPEFRUIT JUICE,</u>						
<u>SINGLE-STRENGTH 2/</u>						
United States.....	546	107	240	26	224	7
British Honduras....	90	135	79	119	273	106
Israel.....	581	1,333	1,942	1,616	1,992	2,779
Jamaica.....	364	284	458	422	287	323
South Africa.....	51	195	116	142	97	180
Trinidad.....	1,172	987	1,313	1,183	706	590
Other.....	36	9	13	25	39	48
TOTAL.....	2,840	3,050	4,161	3,533	3,618	4,033
<u>OTHER CITRUS JUICES</u>						
<u>CONCENTRATED, UNSWEETENED</u>						
United States.....	38	1/	1	1/	6	17
Greece.....	17	72	251	181	208	191
Israel.....	71	55	46	96	198	66
Italy.....	323	530	507	687	519	518
South Africa.....	42	38	18	23	33	20
Windward Islands....	101	53	41	91	48	51
Other.....	31	13	74	62	197	158
TOTAL.....	623	761	938	1,140	1,209	1,021
<u>OTHER CITRUS JUICES</u>						
<u>SINGLE-STRENGTH, UNSWEETENED</u>						
United States.....	11	13	197	20	15	13
Ghana.....	996	681	1,635	1,172	1,518	878
Israel.....	171	390	351	199	115	69
Italy.....	470	904	965	525	629	602
Jamaica.....	366	396	590	449	378	459
Mexico.....	1/	1/	245	416	353	26
South Africa.....	14	137	103	76	77	24
Trinidad.....	69	72	96	58	81	75
Windward Islands....	8	118	307	207	132	133
Other.....	39	32	86	39	116	93
TOTAL.....	2,144	2,743	4,575	3,161	3,414	2,372

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Table 10.--United Kingdom: Imports of citrus products,
by countries of origin, 1962-63 to 1967-68

Item and Country of Origin	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	Cases	Cases	Cases	Cases	Cases	Cases
	24/2's	24/2's	24/2's	24/2's	24/2's	24/2's
<u>GRAPEFRUIT, TINNED OR</u>						
<u>BOTTLED, IN SYRUP</u>						
United States.....	186	22	27	29	19	7
British Honduras....	117	135	67	180	218	220
Cyprus.....	53	62	42	51	97	84
Israel.....	578	507	485	626	730	886
Jamaica.....	457	564	633	578	504	539
South Africa.....	145	266	199	320	333	454
Trinidad.....	127	97	93	138	180	111
Other.....	29	18	5	12	48	60
TOTAL.....	1,692	1,671	1,551	1,934	2,129	2,361
<u>ORANGES, TINNED OR</u>						
<u>BOTTLED, IN SYRUP</u>						
China.....	6	33	49	131	120	206
Cyprus.....	3	15	18	15	19	25
Israel.....	3	10	7	8	4	9
Japan.....	1,491	1,692	1,337	1,648	1,561	1,235
South Africa.....	51	13	5	23	6	14
Spain.....	9	2	4	9	30	33
Taiwan.....	1/	1/	26	34	37	28
Other.....	2	55	5	14	18	22
TOTAL.....	1,570	1,820	1,451	1,882	1,795	1,572

1/ If any, included under "other".

2/ Includes both sweetened and unsweetened juices.

Table 11.--West Germany: Imports of citrus juices
by countries of origin, 1967 and 1968

Item and Country of Origin	1 9 6 7			1 9 6 8		
	Sweetened:	Not Sweetened:	Total	Sweetened:	Not Sweetened:	Total
	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons	Metric Tons
<u>ORANGE JUICE 1/</u>						
United States.....	18	6,987	7,005	44	8,076	8,120
Argentina.....	2/	329	329	2/	495	495
Brazil.....	2/	3,914	3,914	2/	6,822	6,822
France.....	2/	193	193	2/	404	404
Greece.....	2/	5,503	5,503	2/	6,582	6,582
Israel.....	3,892	4,488	8,380	3,037	3,556	6,593
Italy.....	129	2,865	2,994	179	3,774	3,953
Jamaica.....	2/	258	258	2/	53	53
Morocco.....	2/	3,151	3,151	2/	3,785	3,785
Netherlands.....	9,748	86	9,834	7,072	1,426	8,498
South Africa.....	276	1,867	2,143	103	2,300	2,403
Spain.....	2/	5,248	5,248	2/	3,394	3,394
United Kingdom.....	65	77	142	49	21	70
Other.....	19	51	70	20	103	123
TOTAL.....	14,147	35,017	49,164	10,504	40,791	51,295
<u>GRAPEFRUIT JUICE 1/</u>						
United States.....	---	---	1,733	---	---	655
China.....	---	---	94	---	---	104
Greece.....	---	---	171	---	---	179
Israel.....	---	---	4,089	---	---	4,298
Morocco.....	---	---	130	---	---	157
South Africa.....	---	---	483	---	---	268
Other.....	---	---	139	---	---	204
TOTAL.....	---	---	6,839	---	---	5,865
<u>OTHER CITRUS JUICE 1/</u>						
United States.....	---	---	701	---	---	518
Brazil.....	---	---	288	---	---	541
Greece.....	---	---	18	---	---	557
Israel.....	---	---	578	---	---	417
Italy.....	---	---	3,073	---	---	3,403
Netherlands.....	---	---	128	---	---	7,495
South Africa.....	---	---	42	---	---	89
Spain.....	---	---	68	---	---	126
United Kingdom.....	---	---	147	---	---	205
Other.....	---	---	4	---	---	27
TOTAL.....	---	---	5,047	---	---	13,378

1/ Of a density of 1.33 (specific gravity) or less.

2/ If any, included under "other".

Table 12.--Oranges (including tangerines), Fresh: United States Exports
by areas of destination, 1965-66 through 1967-68

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	November 1 - April 30			May 1 - October 31		
	1965-66	1966-67	1967-68	1966	1967	1968
	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}
Canada.....	2,692	3,053	2,199	1,651	2,048	1,162
<u>Europe</u>						
Belgium-Luxembourg..	92	45	3	425	575	94
Denmark.....	11	14	---	9	30	5
France.....	43	90	2/	170	316	23
Germany, East.....	160	436	---	---	---	---
Germany, West.....	43	16	2/	30	64	6
Netherlands.....	201	129	3	652	908	143
Norway.....	56	41	2/	151	126	8
Sweden.....	37	29	3	46	59	4
United Kingdom.....	51	68	1	36	162	5
Other.....	9	11	2	10	7	---
Total.....	703	879	12	1,529	2,247	288
<u>Far East</u>						
Hong Kong.....	499	433	324	510	606	339
Malaysia & Sing. ...	32	13	3	62	113	2
New Zealand.....	136	27	---	---	---	---
Philippines.....	35	28	25	30	37	20
Other.....	59	74	72	73	94	86
Total.....	761	575	424	675	850	447
<u>Caribbean</u>						
Bahamas.....	18	10	14	15	19	21
Neth. Antilles.....	24	29	23	16	21	7
Other.....	4	3	3	4	6	4
Total.....	46	42	40	35	46	32
<u>Latin America</u>						
Mexico.....	24	14	7	106	29	9
Other.....	2/	2/	2/	4	1	2/
Total.....	24	14	7	110	30	9
Other markets.....	2/	1	1	1	2	2/
Total all markets....	4,226	4,564	2,683	4,001	5,223	1,938

^{1/} Equivalent boxes of 70 pounds.

^{2/} Less than 500 boxes.

Table 13.--Lemons and Limes, Fresh: United States Exports
by areas of destination, 1965-66 through 1967-68

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	November 1 - April 30			May 1 - October 31		
	1965-66	1966-67	1967-68	1966	1967	1968
	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}
Canada.....	200	211	208	242	232	241
<u>Europe</u>						
Belgium-Luxembourg..	102	90	53	104	117	119
Denmark.....	16	13	16	19	34	47
Finland.....	22	23	32	13	14	12
France.....	299	315	199	396	402	434
Germany, West.....	40	6	4	187	172	226
Netherlands.....	140	120	96	217	243	281
Norway.....	36	25	30	39	23	37
Sweden.....	46	43	52	67	61	76
United Kingdom.....	36	23	17	30	55	29
Other.....	5	4	4	97	130	9
Total.....	742	662	503	1,169	1,251	1,270
<u>Far East</u>						
Hong Kong.....	25	30	22	27	29	30
Japan.....	330	388	530	382	444	536
Other.....	6	7	7	5	6	6
Total.....	361	425	559	414	479	572
Mexico.....	46	46	48	66	63	50
Other markets.....	3	4	3	18	5	4
Total all markets....	1,352	1,348	1,321	1,909	2,030	2,137

^{1/} Equivalent boxes of 76 pounds.

Table 14.--Grapefruit, Fresh: United States Exports
by areas of destination, 1965-66 through 1967-68

Country of Destination	WINTER EXPORTS			SUMMER EXPORTS		
	September 1 - April 30			May 1 - August 31		
	1965-66	1966-67	1967-68	1966	1967	1968
	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}
Canada.....	1,347	1,881	1,442	415	605	384
<u>Europe</u>						
Belgium-Luxembourg..	33	24	18	32	37	23
France.....	129	144	136	131	135	37
Germany, West.....	61	76	28	11	18	10
Netherlands.....	118	118	72	90	108	53
Norway.....	7	7	6	9	9	6
Sweden.....	60	36	43	10	18	4
United Kingdom.....	12	21	4	6	14	5
Other.....	24	23	4	6	25	7
Total.....	444	449	311	295	364	145
<u>Far East</u>						
Hong Kong.....	2	1	2	1	1	1
Japan.....	16	18	19	13	13	15
Other.....	1	2	1	4	1	1
Total.....	19	21	22	18	15	17
Other markets.....	4	3	7	5	5	7
Total all markets....	1,814	2,354	1,782	733	989	553

^{1/} Equivalent boxes of 80 pounds.

Table 15.--Orange and Grapefruit Products: United States Exports
by countries of destination, 1962-63 through 1967-68

Item and Country of Destination	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>
<u>CANNED SINGLE-</u>						
<u>STRENGTH JUICE</u>						
Orange:						
Canada.....	5,235	3,232	3,901	5,194	6,321	5,455
Europe						
Belgium-Lux.	128	74	34	36	156	472
Denmark.....	26	12	17	60	564	327
France.....	11	6	2	80	909	1,510
Germany, West.....	118	28	14	79	1,135	1,210
Netherlands.....	171	4	20	24	380	534
Sweden.....	120	34	60	170	484	1,980
Switzerland.....	33	12	5	63	215	903
Other Europe.....	172	50	42	81	290	106
Total Europe....	779	220	194	593	4,133	7,042
Bahamas.....	45	56	57	98	136	169
Japan.....	42	34	44	38	60	62
Other countries....	317	342	274	348	456	458
TOTAL.....	6,418	3,884	4,470	6,271	11,106	13,186
Grapefruit:						
Canada.....	2,883	1,855	1,880	2,028	2,233	2,344
Europe						
Belgium-Lux.	133	78	132	90	190	288
France.....	734	311	1,024	402	1,092	889
Germany, West.....	758	37	445	116	503	124
United Kingdom....	560	128	231	29	235	6
Other Europe.....	404	188	260	209	925	617
Total Europe....	2,589	742	2,092	846	2,945	1,924
Other countries....	159	160	214	235	180	204
TOTAL.....	5,631	2,757	4,186	3,109	5,358	4,472

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Table 15.--Orange and Grapefruit Products: United States Exports
by countries of destination, 1962-63 through 1967-68

Item and Country of Destination	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>	<u>Gallons</u>
<u>ORANGE CONCENTRATE</u>						
Frozen:						
Canada.....	2,741	2,163	2,400	2,264	2,942	2,804
<u>Europe</u>						
Germany, West....	595	21	65	175	335	273
Netherlands.....	27	52	57	83	147	168
Sweden.....	66	76	77	67	113	170
Switzerland.....	60	41	33	42	60	73
United Kingdom...	---	3	57	246	487	441
Other Europe.....	13	10	13	40	133	120
Total Europe...	761	203	302	653	1,275	1,245
Other countries...	100	98	105	143	201	177
TOTAL.....	3,602	2,464	2,807	3,060	4,418	4,226
Hot-Pack:						
Canada.....	200	235	162	144	139	122
<u>Europe</u>						
Germany, West....	180	140	105	214	207	142
Ireland.....	1	32	27	37	42	34
Netherlands.....	194	105	78	108	130	121
Switzerland.....	49	33	59	47	61	54
Other Europe.....	45	38	71	40	120	64
Total Europe...	469	348	340	446	560	415
Hong Kong.....	14	50	35	36	38	46
Malaysia & Sing. ..	94	127	125	151	130	102
Philippines.....	143	159	197	43	10	12
Other countries...	62	46	35	22	81	27
TOTAL.....	982	965	894	842	958	724

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Table 15.--Orange and Grapefruit Products: United States Exports
by countries of destination, 1962-63 through 1967-68

Item and Country of Destination	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
ORANGE OIL						
Canada.....	55	140	223	152	182	93
Europe						
Denmark.....	61	88	81	133	204	120
France.....	435	516	989	715	1,058	372
Germany, West.....	416	413	541	578	495	460
Netherlands.....	243	310	357	450	566	488
Spain.....	78	73	83	169	333	175
Switzerland.....	88	193	252	294	382	433
United Kingdom....	459	403	323	386	669	324
Other Europe.....	140	114	389	175	778	293
Total Europe....	1,920	2,110	3,015	2,900	4,485	2,665
Chile.....	53	89	89	139	123	81
Venezuela.....	39	66	59	112	76	42
Japan.....	582	490	513	740	782	818
Other countries....	352	267	355	409	339	411
TOTAL.....	3,001	3,162	4,254	4,452	5,987	4,110
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>Cases^{1/}</u>	<u>Cases^{1/}</u>	<u>Cases^{1/}</u>	<u>Cases^{1/}</u>	<u>Cases^{1/}</u>	<u>Cases^{1/}</u>
GRAPEFRUIT SECTIONS						
Canada.....	55	88	47	65	35	61
Europe						
Ireland.....	29	10	9	8	6	2
Netherlands.....	5	2	4	3	3	1
United Kingdom....	106	28	28	33	20	4
Other Europe.....	7	9	8	6	11	10
Total Europe....	147	49	49	50	40	17
Japan.....	2	2	2	3	2	4
Other countries....	7	8	7	10	6	10
TOTAL.....	211	147	105	128	83	92

^{1/} Equivalent cases of 24 No. 2 cans.

Table 16.--Fresh and Processed Citrus: United States Imports (for consumption)
by countries of origin, 1962-63 through 1967-68

Item and Country of Origin	Year beginning November 1					
	1962-63	1963-64	1964-65	1965-66	1966-67	1967-68
	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}	1,000 Boxes ^{1/}
<u>ORANGES, FRESH</u>						
Haiti.....	4	171	5	---	---	---
Israel.....	51	60	95	149	6	322
Japan.....	4	20	16	11	4	9
Mexico.....	987	1,854	1,266	740	391	1,768
Other countries.....	21	19	12	9	9	42
TOTAL.....	1,067	2,124	1,394	909	410	2,141
	1,000 Gallons ^{2/}	1,000 Gallons ^{2/}	1,000 Gallons ^{2/}	1,000 Gallons ^{2/}	1,000 Gallons ^{2/}	1,000 Gallons ^{2/}
<u>ORANGE JUICE, CONCENTRATED</u>						
Argentina.....	433	1,320	3/	---	50	---
Brazil.....	---	---	3,770	593	2,732	11,062
Jamaica.....	---	499	201	18	---	---
Mexico.....	1,609	3,968	265	23	---	761
South Africa.....	438	95	67	---	---	---
Surinam.....	186	531	---	---	35	19
Other countries.....	1,240	2,208	498	153	38	---
TOTAL.....	3,906	8,621	4,801	787	2,855	11,842
<u>LEMON JUICE, CONCENTRATED</u>						
Italy.....	2,363	930	9	1	23	22
Other countries.....	22	34	---	---	---	---
TOTAL.....	2,385	964	9	1	23	22

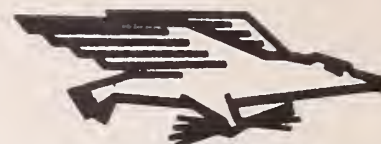
^{1/} Equivalent boxes of 70 pounds.

^{2/} Single-strength equivalent.

^{3/} Less than 500 gallons.

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THE MARKETING SITUATION FOR WINTER CITRUS IN EUROPE

SUMMARY

Citrus production forecasts in the Mediterranean area for 1968-69 are close to the level of production the previous season. Orange (including tangerines), lemon, and grapefruit crops are all expected to surpass the 1967-68 output by narrow margins.

Export performance for Mediterranean oranges during the 1967-68 winter marketing season declined about 4 percent from the record level of 1966-67. Lemon shipments, however, increased slightly, and exports of grapefruit rose 15 percent. Prospects for 1968-69 indicate a further increase in grapefruit exports and a modest increase for lemons. Intense competition in the late winter and early spring is expected to restrain orange exports and is likely to prevent total shipments from exceeding last year's level.

U.S. exports of fresh citrus during the 1967-68 winter marketing period registered substantial declines for fresh oranges (including tangerines) and grapefruit but an increase for lemons. The effects of the December freeze are not yet sufficiently defined to determine the level of fresh citrus exports this season.

Despite the shorter U.S. crops last season, some citrus juices registered export increases over the previous year. This season, several factors are expected to limit the movement of juices, especially to the off-shore markets. These include the shipping strike, higher finished product prices, and increased competition in Europe.

U.S. EXPORT OUTLOOK

Fresh Citrus.--Before the December freeze, prospects for exports during the 1968-69 winter marketing season were far more promising than for the previous year. Last season, exports of oranges ^{1/}dropped 41 percent from 1966-67. Grapefruit exports were almost one-fourth below 1966-67 largely because of reduced shipments to Canada. Only lemons posted an increase, reaching an alltime high.

Although the December freeze reduced the crops in both Florida and California, estimates as of February 1, 1969, still show a considerably larger output of oranges and grapefruit than last season. The present forecast for lemon production indicates the smallest crop since 1964-65, and is one-fifth less than the first estimate published in November of this season.

The freeze and the East and Gulf Coast shipping strike, which is unsettled at the time of this writing, inject an element of uncertainty in evaluating U.S. export prospects. However, it is worth noting that this year's citrus crop is one of the largest on record, and the major export market for both oranges and grapefruit is Canada, a country not so severely affected by a shipping strike as are off-shore markets.

Grapefruit exports for the first half of the season (Sept.-Dec.) are off to the slowest start since 1960-61, largely because of a late Florida crop. Orange shipments for the first third of the season (Nov.-Dec.) are above last year's by 22 percent, but total performance for that season was the worst since 1962-63. Lemon exports are also ahead of last year's. However, exports of both oranges and lemons are far heavier toward the latter part of the winter marketing season as California begins to move larger quantities into export.

(U.S. exports of fresh oranges, grapefruit, and lemons during the winter marketing season are shown in Table 1 at the conclusion of this report.)

Processed Citrus.--Despite the sharp drop in fresh citrus production, last season's exports of juices maintained high levels, including record shipments of single-strength orange juice. This performance was aided to a large degree by the intensive market promotion effort of a team from FAS, the Florida Citrus Commission, and various third-party cooperators. For the 1968-69 season, market promotion projects are operative in 10 Western European countries.

While a relatively abundant citrus crop is available to processors this year, juice yields are well below average. Therefore, the total juice pack will not be as large as the crop size might indicate. Also, the carry-in of frozen concentrated orange juice this season was far below that of last year. In view of the shipping strike and the higher finished-product prices this season, it appears unlikely that exports of most products will equal last year's

^{1/} Figures cited throughout this report are from unrounded data. The term "oranges" as used in this report includes tangerines, unless otherwise indicated.

performance. The major problems will be in the important European market where both the shipping strike and competition are limiting U.S. sales. Chilled orange juice and grapefruit juice in glass containers, relatively new U.S. products on the European market, are especially vulnerable to competition as other countries begin to market the same type product.

(U.S. exports of the principal citrus juice products are set forth in Table 2.)

THE SITUATION FOR FRESH CITRUS IN COMPETING AREAS

Production Prospects for 1968-69

Oranges.--Some Mediterranean countries anticipate wide fluctuations in production between 1967-68 and this season, but the end result is a total crop of 187.8 million boxes, only slightly above 1967-68. Another substantial decline in Spanish output was more than offset by sizable increases in other countries, especially Italy and Greece. In some cases, crops are maturing later than normal, with color lacking and sizes tending toward the smaller ranges.

Lemons.--The major Mediterranean producers expect their sixth consecutive record crop in 1968-69. Although Greece and Spain anticipate sharp reductions, the Turkish and especially the Italian crops are well above the 1967-68 levels. Production should reach 31.4 million boxes, 800,000 more than in 1967-68.

Grapefruit.--The expansion in grapefruit production this decade is expected to continue during the 1968-69 season but at a slower rate than in previous years. Israeli production, after a long string of strong gains, is only 4 percent above the 1967-68 level. Total output by the major suppliers of grapefruit to Europe during the winter months is estimated at 10.6 million boxes.

(A production series for oranges, lemons, and grapefruit in competing areas is shown in Table 3.)

The Export Market Situation for Fresh Citrus

During the early part of the season Mediterranean producers believed that substantial export gains would be registered in all three classes of citrus (oranges, lemons, and grapefruit). The primary reasons being the availability of sufficient fruit, the belief that more orderly marketing will prevail this season, and the hope that major producers will escape the ravages of weather. This was certainly not the situation during the 1967-68 season.

Despite severe freezes in Spain and Greece and various weather disturbances in other countries during 1967-68, the total quantity of fruit available was sufficient to equal the 1966-67 export total, even though the actual performance of oranges fell short. Late-maturing crops plus weather disturbances helped create very unorderly market conditions, causing large quantities of

citrus, especially oranges, to be sent to Europe during a short period of time. Market prices dropped sharply and remunerative returns were not forthcoming, forcing some countries to divert export-quality fruit to other than the desired West European market. Eastern Europe, processing, and the domestic markets were the major alternatives.

During the 1968-69 winter marketing season, Mediterranean citrus, especially oranges, will have to compete in the major market countries with relatively heavy supplies of domestically grown fruit, primarily apples and pears. In addition, it is becoming increasingly apparent that the popularity of citrus juices and soft drinks based on citrus derivatives is rising rapidly; this, in time, can take its toll on fresh marketings, as has happened in the United States.

For the 1968-69 season most Mediterranean producers of oranges could equal or exceed the performance registered during 1967-68, if, as indicated above, more normal marketing conditions prevail. However, it is not likely that the European market will absorb the large quantities of oranges expected to be available during the late winter and early spring. Therefore, it is anticipated that no significant increase in total marketings will take place this season despite the prospect of gains by some individual countries, notably Italy.

Exports of lemons from the Mediterranean area during 1968-69 are expected to exceed the previous year's total by a narrow margin. Italy should ship more of its record large crop to the European market, but shipments from Greece and Spain, the second and third ranking exporters, are expected to decline this season.

Grapefruit exports have risen every season this decade and were $2\frac{1}{2}$ times as great in 1967-68 as in 1960-61. With continued expansion in demand, and growing supplies, there is no reason to believe shipments during 1968-69 will not reach an alltime high once again, possibly approaching the 6-million-box level.

(Citrus exports from countries competing with the United States in European markets are shown in Table 4.)

The following section describes the situation for fresh citrus in the individual countries.

Cyprus.--A total orange crop of 2.9 million boxes is forecast for 1968-69, slightly above the 1967-68 level, as more Shamouti oranges are expected to offset a smaller output of Valencias. Grapefruit production is forecast at 1 million boxes again this season, but the lemon crop in 1968-69, estimated at 590,000 boxes, will be off by about 10 percent. Some damage to the orange and grapefruit crops was reportedly caused by a hailstorm in January, but the exact amount has not been determined.

The export market absorbed another record amount of citrus during the 1967-68 season as 81 percent of total production or 119,940 metric tons were shipped

compared with 104,074 the previous year. This represented increases of 52 percent for Valencias, 46 percent for lemons, and 10 percent for grapefruit; but Shamouti exports dropped 30 percent. As usual the United Kingdom was the leading customer for oranges, lemons, and grapefruit, receiving almost one-third of total exports. Shipments of citrus in 1968-69 were expected to approximate last year's total before the recent hailstorm.

Greece.--Severe frost damage in both December and January last season left the citrus crop far short of early-season estimates. However, a heavy fruit set plus favorable spring and summer weather conditions should combine for a more normal output of oranges during the 1968-69 season. The lemon-producing districts of Corinth and Achaia suffered considerable damage; hence, lemon production is expected to decline again this year. Present estimates place the 1968-69 crop of sweet oranges at 10.9 million boxes and tangerines at 819,000 boxes for a combined crop about 78 percent above the previous season but 8 percent below 1966-67. Lemon production is estimated at 1.9 million boxes, well under the output of recent years.

Although total exports declined in 1967-68 to 120,693 metric tons from 153,937 the previous year, the amount sent to the Common Market countries increased with efforts to further reduce dependence on Soviet-oriented countries. Despite a steady decline in the importance of these countries, they remain a major customer, receiving 44 percent of total exports (35 percent of the oranges and 60 percent of the lemons), while the EEC received 25 percent. Almost all of the remaining citrus was destined for Yugoslavia and Austria. If weather conditions are favorable, exports of sweet oranges and tangerines should exceed last season's total, but shipments of lemons will probably fall short. In 1967-68 about 40 percent of total citrus production was exported, compared with 30 percent of the record 1966-67 crop.

Because of the reduced crop and short export season, the considerable number of citrus-packing facilities installed last year was only partly utilized. As a result, packers report considerable losses. The government continued its practice of subsidizing exports in 1967-68, but the amount of the subsidy was not released. However, it is believed to be at least equal to the previous year's level of 0.45 cents per pound (net weight basis) for common oranges and 0.76 cents for Navels, blood and Shamouti oranges, lemons and tangerines. In addition, more than \$4 million in grants was made available to citrus growers who did not secure sufficient income from the sale of their crops. From \$5 million to \$6.7 million was to be paid by the Farmers Insurance Organization to growers who lost their entire crop, and about \$2.3 million in loans was to be made available to growers. Expectations are that subsidies will be utilized again this season.

Israel.--Production of oranges in 1968-69 is forecast at a record 30.9 million boxes, 1.3 million above the previous year's output, while grapefruit production is expected to reach a new record of 7.6 million boxes. The lemon crop is estimated at 1.1 million boxes, slightly below 1967-68. Fruit is ripening earlier than last year's late crop. Until January, quality of the crop was considered excellent--especially that of Shamoutis, which account

for 72 percent of the orange crop, and of grapefruit. Heavy rains in January caused some flooding and possibly some lowering of quality.

The export market is vital to the citrus industry of Israel, absorbing more than 60 percent of production each season, but the experience during 1967-68 in this sector was not judged to be satisfactory by the Israeli's. Despite an increase in fresh fruit exports of 13 percent by volume, total income from fresh exports declined slightly (in devalued pounds). Prices dropped sharply in some major European markets during the early spring months, especially March, and at certain times during this period returns for fresh fruit were well below the previous year's level. The record size of the late-maturing crop and its relatively poor quality were major factors contributing to the marketing difficulties.

The percentage of the crop exported as fresh fruit declined last season, as did local fresh sales; hence, a higher percent was processed. It is claimed the average price paid by processors does not cover production costs.

Although it is generally realized that part of the problem facing Israeli exports is the growing supply from competing Mediterranean producing areas, the marketing organization of the Citrus Marketing Board is largely blamed for the disappointing results of the 1967-68 season. Therefore, major changes in marketing procedures have been announced, including the following:

1. The practice of preseason sales at fixed prices will be discontinued.
2. Sales to Europe will be directed from the Tel Aviv Headquarters and not from the London offices. Arrangements with the shipping companies will allow last minute switching of cargoes even after they have passed the Straits of Gibraltar.
3. Dependence on Hamburg jobbers will be lessened by increasing the scope of business conducted directly from Rotterdam, Frankfurt, and Munich. Israeli citrus will be sold directly to large customers, such as chain stores or supermarkets.
4. For the first time packing and quality of the fruit will be controlled directly in the packing houses by the Citrus Marketing Board inspectors. Previously, spot checks were made only in the port warehouses.

Payments to the citrus industry at the rate of 7 cents per dollar of export earnings and \$2.00 per metric ton of fruit processed resulted in a total subsidy for the 1967-68 season of \$6.8 million. During 1966-67, the total was \$4.2 million. For the 1968-69 season the rate has been increased to 10 cents per dollar of export earnings.

Exports of fresh citrus in 1967-68 climbed 13 percent from the previous year, with most of the increase going to the Common Market countries. This area received 47 percent of total fresh exports. However, the United Kingdom

remained the largest single market, accounting for about one-quarter of Israel's exports, with West Germany a close second. Although exports to the Far East more than doubled again in 1967-68 and shipments to Eastern Europe rose about 8 percent, the quantity destined for these areas remained small. Further increases in exports to Eastern Europe, the Far East, and the United States are planned for 1968-69. In addition, two new customers are to be added: Japan and New Zealand. Overall, the coming season is expected to show an increase in orange and grapefruit exports but a decline for lemons.

Italy.--Record output for all classes of citrus characterize the 1968-69 season as generally favorable weather and increased bearing acreage continued to push Italian citrus production upward. The sweet-orange crop is estimated at 42.2 million boxes, 3 million above the previous high set in 1967-68. Smaller than normal sizes are expected, especially during the early part of the season. The crop is maturing late, juice content is low, and quality is not considered good. A breakdown of the 1967-68 crop shows blood-type oranges as a group comprising 59 percent of total production; these varieties have expanded most rapidly in recent years. Navels and Valencias combined only accounted for 2 percent of the crop.

Tangerine production is expected to reach a record 7.9 million boxes, more than 2 million above the 1967-68 level. Quality is considered fair but sizes are below normal.

Lemon output for 1968-69 is also projected at an alltime high, 21.5 million boxes, 10 percent above 1967-68. Both the winter and the summer, or verdelli, crops are expected to be above the levels of the previous season. Italy is now the world's major lemon producer for the second consecutive year. As is the case for other citrus, sizes are running on the small side.

Bearing as well as nonbearing acreage increased in 1967 for sweet oranges, tangerines, and lemons.

Bountiful and expanding supplies of Italian citrus during the past few seasons have provided problems in a nation dependent largely on the domestic market and where production and marketing practices still lag behind many in the Mediterranean area. Italy exported about 12 percent of its sweet-orange crop in fresh form during the 1967-68 season, accounting for only a few percent of the total supplies utilized by her EEC partners. Despite an intricate wall of protection spearheaded by import duties and reference prices, a "crisis" (described below) was not averted. Furthermore, exports have failed to equal production expansion.

In accordance with an EEC regulation governing support prices for sweet oranges, the Italian Minister of Agriculture declared a crisis market situation in April 1968 when prices fell below a predetermined level. Consequently, the government was authorized to purchase all oranges at the equivalent of 5.9 U.S. cents per pound for Sanguinello, first category 67/81 mm., packed. Prices for other varieties were adjusted according to established regulations. Approximately 1 million boxes were removed from the market. The Italian government will undoubtedly purchase fresh citrus again this year.

Already this season aid to the mandarin growers in the Palermo area in Sicily is being studied by the Ministry, and programs are being considered including subsidies to harvest, transport, process, and sell the fruit. Export subsidies are granted for sweet oranges exported to Austria and Sweden, (1.16-1.52 cents per lb. net), East Germany and Poland (0.51 cents), and Switzerland (0.65 cents); mandarins shipped to Sweden (2.1 cents) and Switzerland (0.8 cents); and lemons for Poland, Sweden, Hungary (all 0.58 cents), and the United Kingdom (0.73 cents).

Exports during the 1967-68 season were approximately 4.9 million boxes of sweet oranges, 11 percent above the previous season. West Germany and Switzerland, long-time customers, were again the major importers, with the growing East German market in third position. Tangerine exports totaled about 488,000 boxes, the smallest amount in recent history, and were destined mainly for West Germany and Switzerland. Exports of lemons, the most important citrus item in the export line, were 10.1 million boxes, 12 percent above the previous year. West Germany received about one-third of the shipments and was by far the major market. Of the total production of these three citrus items, about 24 percent was exported.

Barring adverse weather conditions, export prospects for this season are considered more favorable than last year despite lower quality fruit. At least a 10 percent increase in exports is forecast for both oranges and lemons, and after last season's disastrous performance staged by tangerine exports, at least a doubling in shipments is expected for 1968-69.

Japan.--Mainly because of favorable growing conditions, Satsuma orange production is forecast at a record 70.1 million boxes for 1968-69, 40 percent above last year. The area devoted to Satsumas, currently estimated at 383,000 acres, has increased in recent years at an annual rate of about 10 percent, reflecting more favorable grower returns than received for other crops. Domestic demand has remained strong, with over 80 percent of the total crop consumed as fresh fruit each season. A continued expansion in production is expected in future years since 45 percent of present acreage is nonbearing.

Exports constitute a minor outlet for fresh Satsuma oranges and totaled only 604,092 boxes during 1967-68, with more than 70 percent destined for Canada. In view of the bumper crop this year, preparations have been made to ship fresh oranges to the four States in the continental United States where their entry is now permitted (Washington, Oregon, Idaho, and Montana). These exports will be made only from areas examined and approved by both Japanese and U.S. plant quarantine authorities. Total exports to be marketed in the above-mentioned States in 1968-69 are forecast at 15,000-20,000 boxes. Imports into Alaska, where entry of Satsumas has been allowed, ranged between 3,816 and 19,505 boxes during the past five seasons.

Morocco.--The outlook for 1968-69 calls for a sweet-orange crop of 19.2 million boxes, 7 percent below last season; tangerines are projected at 3.9 million, up 5 percent. Production of both lemons and grapefruit is expected to be lower. Adverse weather during the bloom is largely to blame for the anticipated reduction in citrus output. However, fruit size and quality are

expected to be good and widespread rains in early November could result in a larger crop than initially forecast, as was the case last year. Of the approximately 146,454 acres planted to citrus in Morocco, 70 percent are in sweet oranges and 27 percent in tangerines.

Exports during the 1967-68 season reflected the record supply position and high quality of the crop, reaching 16 million boxes of sweet oranges and 2.9 million boxes of tangerines. Shipments during the previous season totaled 13.8 million and 2.3 million, respectively. Lemons and grapefruit play a minor role in exports. Of total citrus production in 1967-68, 77 percent was exported, compared with 74 percent the previous season. France continued as the leading importer of all categories of citrus, receiving 37 percent of the sweet oranges and 62 percent of the tangerines. The U.S.S.R., in second position, received 23 percent of the oranges. Increased shipments to the Western European countries were almost entirely responsible for the larger amounts of citrus exported in 1967-68, partly because of less competition from Spain in this area. As a consequence, the expected sharp increase in exports to the USSR did not materialize. Actually, a major factor in even maintaining shipments to Russia at this high level was the difficulties experienced during certain periods on the Western European market. This made Russia a welcome outlet, especially for small sizes and late orange varieties.

Exports during the 1968-69 season are expected to remain at a high level, but at this time it does not appear that they will exceed the 1967-68 total. Because of warm weather the fruit did not color, and early-season shipments were slow. In 5 years Morocco hopes to increase total citrus exports by one-third from last season's level.

Spain.--Citrus production in Spain has been hit by a number of crop-reducing phenomena during the past 2 years, leaving this season's production far below the record 1966-67 output. Preseason estimates place the 1968-69 sweet orange crop at 48.8 million boxes, 17 percent below last year's preseason estimate; tangerine production is placed at 5.7 million boxes, almost 700,000 boxes short of the 1967-68 estimate. The lemon crop forecast is down sharply to 2.3 million boxes, while grapefruit production is up slightly to 193,000 boxes. A period of below-freezing temperatures in mid-December 1967 held exports of citrus to a level about 280,000 metric tons below preseason estimates. Despite the freeze, the crop forecasts for 1967-68 have not been revised.

A breakdown of the sweet-orange crop shows Navels and similar varieties comprising 41 percent of the total output but production is more than one-fifth less than in 1967-68. The only other varietal group approaching Navels and similar varieties in magnitude is the blood types, which account for about 26 percent of the crop. Approximately 1.9 million boxes of Valencia Lates are expected, 19 percent below 1967-68. In general, the citrus crop is maturing late this season.

The smaller citrus crop is the combined result of last winter's frost damage, summer drought conditions, and an unusually high fruit drop. Lack of adequate rainfall appears to be the most important natural hazard affecting this season's citrus crop, but a more serious threat for the future seems to be emerging: the virus tristeza. This disease, already present in many citrus-producing areas of Spain, is particularly prominent in five municipalities in Valencia, the most important citrus-producing province in Spain, where an estimated 1.5 million trees have been affected.

Several measures are being taken to prevent its spread. A decree issued by the Ministry of Agriculture consolidates the existing legislation on tristeza control, establishing the qualification of "diseased" and "free" areas. New plantings on sour orange stock are prohibited in both regions as is the movement of citrus trees out of the "diseased" area. In addition, the government will exercise strict control over new plantings and will provide nurseries with an adequate supply of seeds of tristeza-resistant rootstock.

Exports during the 1967-68 season registered another decline, as only 26.9 million boxes of sweet oranges and 5.1 million boxes of tangerines were shipped to European markets, 18 percent below the total for 1966-67 and the least since 1962-63. About 48 percent of total citrus production was exported last season, a drop from the 52 percent shipped in 1966-67. Spanish dependence on the market for citrus in the EEC is clearly portrayed by the export statistics. More than three-quarters of the sweet orange and tangerine shipments made in 1967-68 were destined for the Common Market countries, with Spain's two best customers, West Germany and France, accounting for 60 percent. In addition, 83 percent of the 870,237 boxes of lemons were sent to these same two countries.

Although some sources predict a considerable increase in exports over last season, it appears more likely that Spain's short crop, coupled with increasing competition, will preclude any gain during 1968-69 unless domestic consumption and processing are curtailed. Blood ovals, the second largest variety from the standpoint of production and very significant in the export trade during the latter part of the season, are running late, but the reduction in the output is less than that for Navels. Blood-type oranges cannot successfully compete with heavy marketings of higher quality oranges from Israel and Morocco; hence, an increase in total exports is not expected to be achieved. Navels and similar varieties, the most important orange group in the export market, suffered the largest drop in production for 1968-69. It is hoped that because of the smaller crop, prices will be above those of the past two seasons and finding markets less difficult than 2 years ago when the record crop was marketed.

Trinidad and Tobago.--Once again heavy rains during the period of bloom reduced production of citrus in Trinidad and Tobago. Output in 1968-69 is forecast at 285,700 boxes of oranges, 40 percent below 1966-67 and 5 percent less than last season's crop. Grapefruit production is only 450,000 boxes, the smallest crop since 1953.

Exports of grapefruit during the period July 1967-June 1968 totaled only 68,300 boxes, of which 48,962 went to the United Kingdom and 15,512 to West Germany. Trinidad has been experiencing increasing difficulty in marketing its fresh grapefruit in Europe, mainly because of intense competition from the Mediterranean producers. Therefore, in an attempt to increase returns to growers, the Association plans to begin future harvests at an earlier date and to ship more fruit to Europe during November and December.

Turkey.--Production of citrus is expected to be at record levels in 1968-69 although the extent of damage suffered from a late December flood in the major citrus-producing district of Merzin is yet to be determined. Output of lemons, the most important citrus from the standpoint of export competition, are forecast at 3.2 million boxes, 22 percent above last season's output. Exports of this item during the 1967-68 season totaled a record 690,997 boxes, exceeding the previous year's total by almost one-half. About 61 percent was destined for Eastern European countries, with most of the remainder going to West Germany.

The orange crop is expected to be 12.9 million boxes, or 900,000 more than in 1967-68 when only 3 percent was exported. Turkish tangerines have met with more success than oranges on the export market, as 18 percent of the two million boxes produced in 1967-68 were exported, mostly to West Germany and Austria. This year's crop is estimated at 1.7 million boxes.

THE SITUATION FOR CITRUS PROCESSING IN COMPETING AREAS

Processing activity was highlighted during the 1967-68 season by the large increase in the amount of citrus, notably oranges, utilized by the Israeli industry, by far Europe's most important source of citrus juices in the Mediterranean area. Once again, events in the export sector for fresh fruit, not demand for the processed product, were responsible for much of this activity. Prices received for the fresh fruit were very poor at times during the season, forcing the producing countries to either discard the fruit, increase sales on the domestic or Eastern European markets, or direct it to the processing industry.

More fruit was diverted to the processors in some countries during the first months of the 1968-69 season than anticipated. This factor coupled with the considerable activity expected to be generated by heavy supplies toward the latter portion of the season should maintain the volume of citrus entering the processing sector at a high level.

The following table shows the approximate tonnage utilized by the major Mediterranean countries for processing during the past two seasons in comparison with that used by the United States:

Variety and country	1966-67			1967-68 ^{1/}		
			Percent			Percent
	Production	Processed	processed	Production	Processed	processed
	metric tons	metric tons	Percent	metric tons	metric tons	Percent
Oranges & tangerines:						
Greece	406.0	91.0	22	209.8	41.0	20
Israel	797.7	203.1	25	940.0	300.2	32
Italy	1,369.5	353.0	26	1,424.7	368.0	26
Morocco	676.2	65.0	10	776.2	65.0	8
Spain	2,345.9	201.5	9	2,076.0	207.0	10
Total	5,595.3	913.6	16	5,426.7	981.2	18
U.S.	7,686.7	5,529.4	72	5,279.0	3,802.1	72
Lemons:						
Greece	106.9	18.0	17	93.1	18.0	19
Israel	40.5	16.5	41	40.0	14.1	35
Italy	603.9	110.0	18	670.3	140.0	21
Spain	94.8	6.5	7	112.0	8.0	7
Total	846.1	151.0	18	915.4	180.1	20
U.S.	617.8	297.6	48	570.6	248.0	43
Grapefruit:						
Israel	222.2	88.7	40	265.0	101.2	38
Morocco	17.3	3.0	17	15.0	3.0	20
Spain	6.9	2.0	29	6.0	2.0	33
Total	246.4	93.7	38	286.0	106.2	37
U.S.	2,081.1	1,144.9	55	1,613.0	809.2	50

^{1/} Preliminary.

Greece.--Processing activity was at its lowest level since 1962-63 as only 59,000 metric tons of fresh citrus were utilized by this sector; this was 19.5 percent of total production, compared with 21 percent in 1966-67. First reports indicate about 20,000 metric tons of orange juice were produced (expressed in single-strength equivalents), versus 38,000 in 1966-67. Processing of oranges during the 1968-69 season is expected to increase substantially from last year's low level, but lemon processing should decline.

Growers who sold their orange crop to the processing plants in 1967-68 reportedly received 0.45 cents per pound (net weight basis) and 0.76 cents for lemons and tangerines. Packers delivering their discards received 0.45 cents per pound for all varieties. During 1966-67 growers were paid 0.30 cents per

pound for oranges and tangerines and 0.45 cents for lemons unless the juice was exported, in which case the subsidy was increased to 0.76 cents per pound for both lemons and tangerines.

During the first 6 months of 1968, 8,485 metric tons of single-strength orange juice and 620 tons of concentrate were exported, with about 68 percent of the single-strength juice shipped to West Germany and 67 percent of the concentrate to East Germany. These exports were only slightly below the performance for single-strength juices during the first 6 months of 1967, but concentrate shipments were about 60 percent of 1967.

Israel.--The amount of fruit entering the processing sector in 1967-68 rose by more than one-third from the previous season to 415,500 metric tons. The major factor contributing to the sharp increase in processing activity was the drop in prices received for fresh fruit in the major European markets. Because of the unsatisfactory returns achieved in this outlet, it was decided to reduce fresh exports and process a considerably larger amount than anticipated.

Export performance during fiscal 1967-68 reflected the high level of processing activity, as all major categories registered substantial gains from the previous year. Export statistics for some of the processed items are shown on a fiscal year basis in the following table:

<u>Commodity</u>	<u>1965-66</u> <u>Metric tons</u>	<u>1966-67</u> <u>Metric tons</u>	<u>1967-68</u> <u>Metric tons</u>
Grapefruit segments	9,952	9,464	13,326
Natural orange juice (unsweetened)	19,900	15,423	20,561
Natural grapefruit juice (unsweetened)	14,060	10,642	14,991
Conc. orange juice (unsweetened)	5,406	4,365	6,123
Conc. grapefruit juice (unsweetened)	262	298	724
Frozen conc. orange juice	384	418	611
Frozen conc. grapefruit juice	31	369	612
Orange juice, sugar added up to 5%	2,460	5,988	8,945
Grapefruit juice, sugar added up to 5%	2,200	5,785	7,906

Approximately 90 percent of the grapefruit segments are destined for the United Kingdom, which is also the leading customer for several of the other juices. West Germany, France, and the Netherlands are the next three most important markets. Before the January floods, fruit quality was generally excellent, and increased marketing of the fresh fruit was expected to reduce the amount processed. Now, however, a lowering in quality is likely to keep the processing industry active again this season. Despite the prominent position Israel holds as a supplier of juices to the European market, processing remains largely an outlet to remove surplus and poor-quality fruit. Therefore, prices paid by processors are well below those received for fruit entering the fresh outlets. The large number of processors and the resulting inefficiency have been cited in the past as reasons for the industry's reputed unprofitability. Apparently, little has been accomplished up to now in the

way of reorganization and consolidation, despite the establishment in 1967 of a Citrus Products Production and Marketing Board.

Italy.--The Italians continue to process a larger quantity of citrus than any other country in the Mediterranean Basin - about 508,000 metric tons of oranges, tangerines, and lemons during the 1967-68 season. This was about 10 percent above the previous year's level.

Accurate production statistics are not available for the individual products, but as is the case for the fresh fruit, most of the citrus juices are consumed domestically. Partial statistics for 1967-68 show 5,227 metric tons of orange juice exported from November through June, compared with 6,519 for the entire previous season. Lemon juice shipments for the same period of the 1967-68 season totaled 11,344 metric tons, versus 12,751 the previous season. Well over one-half the orange juice was destined for West Germany, while the United Kingdom was the largest customer for lemon juice and West Germany second. Exports of essential oil of lemon were 504 metric tons during the October-June period, versus 480 the previous year. Most shipments went to the United Kingdom.

Evidently the relatively low cost for lemons and relatively high price for the finished product, especially essential oil, have made lemon processing more advantageous than that of other citrus. Not only do the orange juice and other derivatives face more intense competition in the export market, but the major processors of oranges located in Sicily are poorly situated from the standpoint of supplies because of the high concentration of blood-type oranges. The latter are more costly and have not proven satisfactory for juice production. Therefore, most of the oranges processed are of the non-blood type. Major areas growing this type are located in the extreme southern part of the Italian mainland. Despite the problems involved, including a tendency for the juice to have a bitter taste, domestic consumption of orange juice is apparently growing. A similar trend is reported in production of citrus-based soft drinks, which require a minimum of 12 percent of citrus juice by liquid.

The general practice is to process mainly culls from the groves and packing-houses because of the higher prices received on the fresh market for better quality citrus fruit. As previously mentioned, a depressed market situation was declared for fresh market oranges last spring, initiating measures to increase prices received for the fruit. The processing industry protested in view of the increasing difficulties it had in obtaining cheaply priced citrus. As an aid to the industry a decree was issued in November 1968 to subsidize the exportation of orange juice to the United Kingdom at the rate of 1.89 cents per pound (based on a 6-to-1 concentration and adjusted for other concentrations). Subsidization is also available for lemon juice exports to the United Kingdom at the rate of 2.03 cents per pound (based on a 4-to-1 concentration and adjusted for other concentrations).

Japan.--Processing is mainly devoted to the production of the well-known canned Satsuma orange. During the 1967-68 season, 200,000 metric tons or 12.5 percent of the total crop was utilized by the canners, down 40,000

Table 1.--United States exports of fresh citrus fruits
by area of destination, winter marketing season,
1958-59 to 1967-68 ^{1/}

Item and season	Canada	Europe					Other	Total
		United Kingdom	Common Market ^{2/}	Scandinavia ^{3/}	Other	Total		
	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}	1,000 boxes ^{4/}
Oranges:								
1958-59.....	2,733	---	368	141	30	539	547	3,819
1959-60.....	2,827	3	73	40	5	121	690	3,638
1960-61.....	1,967	2	27	40	---	69	398	2,434
1961-62.....	2,115	5	62	5	4	76	406	2,597
1962-63.....	1,610	8	17	1	121	147	326	2,083
1963-64.....	2,404	1	41	45	1	88	596	3,088
1964-65.....	2,153	25	172	62	2	261	408	2,822
1965-66.....	2,692	51	379	110	163	703	831	4,226
1966-67.....	3,053	68	280	85	446	879	632	4,564
1967-68.....	2,213	1	7	3	1	12	471	2,696
Lemons: ^{5/}								
1958-59.....	200	33	326	54	39	452	61	713
1959-60.....	186	100	618	87	40	845	85	1,116
1960-61.....	191	101	587	90	24	802	89	1,082
1961-62.....	195	114	689	79	15	897	112	1,204
1962-63.....	204	31	259	58	5	353	111	668
1963-64.....	206	23	386	88	4	501	136	843
1964-65.....	201	14	213	71	5	303	258	762
1965-66.....	200	36	582	119	5	742	410	1,352
1966-67.....	211	23	531	104	4	662	475	1,348
1967-68.....	208	26	452	195	10	683	621	1,512
Grapefruit:								
1958-59.....	1,069	44	225	29	13	311	19	1,399
1959-60.....	1,211	33	213	36	17	299	20	1,530
1960-61.....	1,232	79	293	40	9	421	30	1,683
1961-62.....	1,343	89	424	57	7	577	22	1,942
1962-63.....	1,029	18	335	31	7	391	15	1,435
1963-64.....	1,179	17	291	58	6	372	26	1,577
1964-65.....	1,198	15	342	60	8	425	21	1,644
1965-66.....	1,347	12	342	84	6	444	23	1,814
1966-67.....	1,881	21	362	48	18	449	25	2,355
1967-68.....	1,442	3	254	52	2	311	29	1,782

^{1/} Winter marketing season: oranges and lemons, November 1 - April 30; grapefruit, September 1 - April 30,

^{2/} Belgium, France, Italy, Luxembourg, Netherlands, and West Germany.

^{3/} Denmark, Finland, Norway, and Sweden.

^{4/} Box weights: oranges, 70 pounds; lemons, 76 pounds; grapefruit, 80 pounds.

^{5/} Including limes.

Foreign Agricultural Service. Compiled from reports of the U.S. Department of Commerce.

Table 2.--United States exports of citrus fruit juice
by areas of destination, seasons 1958-59 to 1967-68 1/

Item and season	:	:	Europe					:	:	
			Canada	United Kingdom	Common Market 2/	Scandinavia 3/	Other			Total
	:	:	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	:	:	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>	<u>gallons</u>
<u>Single-Strength Juice</u>	:	:	:	:	:	:	:	:	:	:
Orange:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	:	6,343	4	290	385	100	779	586	7,708
1959-60.....	:	:	7,694	293	456	467	121	1,337	644	9,675
1960-61.....	:	:	5,555	59	185	196	45	485	507	6,547
1961-62.....	:	:	6,225	132	1,193	534	114	1,973	672	8,870
1962-63.....	:	:	5,235	100	456	176	47	779	404	6,418
1963-64.....	:	:	3,232	5	137	61	17	220	432	3,884
1964-65.....	:	:	3,901	7	79	92	16	194	375	4,470
1965-66.....	:	:	5,194	10	237	245	101	593	484	6,271
1966-67.....	:	:	6,321	198	2,589	1,085	261	4,133	652	11,106
1967-68.....	:	:	5,455	29	3,740	2,338	934	7,041	690	13,186
	:	:	:	:	:	:	:	:	:	:
Grapefruit:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	:	3,104	438	1,335	141	70	1,984	292	5,380
1959-60.....	:	:	3,305	255	749	160	102	1,266	156	4,727
1960-61.....	:	:	3,302	594	1,663	141	97	2,495	202	5,999
1961-62.....	:	:	3,266	960	2,527	199	168	3,854	240	7,360
1962-63.....	:	:	2,883	560	1,770	127	132	2,589	159	5,631
1963-64.....	:	:	1,855	128	490	53	71	742	160	2,757
1964-65.....	:	:	1,880	231	1,692	106	63	2,092	214	4,186
1965-66.....	:	:	2,028	29	668	90	59	846	235	3,109
1966-67.....	:	:	2,233	235	1,968	184	558	2,945	180	5,358
1967-68.....	:	:	2,344	6	1,476	195	247	1,924	204	4,472
	:	:	:	:	:	:	:	:	:	:
<u>Orange Concentrate</u>	:	:	:	:	:	:	:	:	:	:
Hot Pack:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	:	155	216	195	21	36	468	60	683
1959-60.....	:	:	159	135	335	66	37	573	69	801
1960-61.....	:	:	234	---	447	67	41	555	214	1,003
1961-62.....	:	:	176	---	494	59	65	618	354	1,148
1962-63.....	:	:	200	---	384	30	55	469	313	982
1963-64.....	:	:	235	---	254	24	70	348	382	965
1964-65.....	:	:	162	---	203	33	104	340	392	894
1965-66.....	:	:	144	---	336	21	89	446	252	842
1966-67.....	:	:	139	---	362	81	117	560	259	958
1967-68.....	:	:	122	---	278	39	98	415	187	724

See footnotes at end of table.

Table 2.--United States exports of citrus fruit juices
by areas of destination, seasons 1958-59 to 1967-68 1/-Con.

Item and season	:	Europe					:	Other	:	Total
		Canada	United Kingdom	Common Market 2/	Scandinavia 3/	Other				
		1,000	1,000	1,000	1,000	1,000		1,000		1,000
		gallons	gallons	gallons	gallons	gallons		gallons		gallons
<hr/>										
<u>Orange</u>	:	:	:	:	:	:	:	:	:	:
<u>Concentrate</u>	:	:	:	:	:	:	:	:	:	:
(continued)	:	:	:	:	:	:	:	:	:	:
Frozen:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	3,139	1	31	59	22	:	113	:	3,436
1959-60.....	:	3,674	1	608	129	28	:	766	:	4,595
1960-61.....	:	3,364	5	628	42	26	:	701	:	4,202
1961-62.....	:	3,918	3	714	84	64	:	865	:	4,905
1962-63.....	:	2,741	---	628	68	65	:	761	:	3,602
1963-64.....	:	2,163	3	80	79	41	:	203	:	2,464
1964-65.....	:	2,400	57	132	80	33	:	302	:	2,807
1965-66.....	:	2,264	246	291	74	42	:	653	:	3,060
1966-67.....	:	2,942	487	573	122	93	:	1,275	:	4,418
1967-68.....	:	2,804	440	533	191	81	:	1,245	:	4,226
<hr/>										
<u>Grapefruit</u>	:	:	:	:	:	:	:	:	:	:
<u>Concentrate</u>	:	:	:	:	:	:	:	:	:	:
Hot Pack:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	10	---	24	16	27	:	67	:	189
1959-60.....	:	10	1	26	15	34	:	76	:	145
1960-61.....	:	42	---	49	16	18	:	83	:	272
1961-62.....	:	19	3	37	22	52	:	114	:	173
1962-63.....	:	6	2	56	22	28	:	108	:	138
1963-64.....	:	18	1	21	33	85	:	140	:	185
1964-65.....	:	48	2	46	26	34	:	108	:	192
1965-66.....	:	24	2	40	8	74	:	124	:	165
1966-67.....	:	11	1	27	15	81	:	124	:	153
1967-68.....	:	24	---	26	29	92	:	147	:	188
<hr/>										
Frozen:	:	:	:	:	:	:	:	:	:	:
1958-59.....	:	135	---	5	---	2	:	7	:	161
1959-60.....	:	108	---	4	6	2	:	12	:	134
1960-61.....	:	139	2	9	6	---	:	17	:	193
1961-62.....	:	147	---	78	13	2	:	93	:	264
1962-63.....	:	164	---	4	3	1	:	8	:	193
1963-64.....	:	157	---	8	1	2	:	11	:	181
1964-65.....	:	155	2	6	---	3	:	11	:	201
1965-66.....	:	183	---	6	1	2	:	9	:	251
1966-67.....	:	207	3	9	2	3	:	17	:	284
1967-68.....	:	225	70	4	---	5	:	79	:	355

1/ November 1 - October 31.

2/ Belgium, France, Italy, Luxembourg, Netherlands, and West Germany.

3/ Denmark, Finland, Norway, and Sweden.

Foreign Agricultural Service. Compiled from reports of the U.S. Department of Commerce.

Table 3.--Production of citrus fruits in principal countries
competing with the United States in Europe,
seasons 1964-65 to 1968-69

Variety and country	1964-65	1965-66	1966-67	1967-68	Estimated 1968-69
	Million boxes 1/	Million boxes 1/	Million boxes 1/	Million boxes 1/	Million boxes 1/
Oranges and Tangerines:					
Algeria.....	14.0	12.0	12.0	11.8	12.3
Cyprus.....	2.1	1.9	2.5	2.8	2.9
Greece.....	10.1	10.0	12.8	6.6	11.7
Israel.....	21.3	20.8	25.1	29.6	30.9
Italy.....	37.3	37.0	43.1	45.3	50.1
Morocco.....	16.1	18.8	21.3	24.4	23.1
Spain.....	54.9	58.9	73.9	65.4	54.5
Tunisia.....	2.5	2.4	3.0	1.6	2.3
Total, 8 countries.....	158.3	161.8	193.7	187.5	187.8
Lemons:					
Algeria.....	.4	.4	.4	.4	.4
Cyprus.....	.3	.4	.5	.7	.6
Greece.....	2.6	2.8	3.1	2.7	1.9
Israel.....	.9	1.0	1.2	1.2	1.1
Italy:					
Winter.....	14.5	14.3	15.4	15.4	17.0
Summer.....	1.7	1.9	2.1	4.0	4.5
Total, Italy.....	16.2	16.2	17.5	19.4	21.5
Morocco.....	.3	.3	.3	.1	.1
Spain.....	3.2	2.7	2.7	3.2	2.3
Tunisia.....	.4	.4	.4	.3	.3
Turkey.....	1.1	2.3	2.5	2.6	3.2
Total, 9 countries.....	25.4	26.5	28.6	30.6	31.4
Grapefruit:					
Algeria.....	.08	.08	.08	.09	.09
British Honduras.....	.24	.25	.24	.23	.26
Cyprus.....	.59	.65	.88	0.98	1.03
Israel.....	4.38	5.10	6.12	7.30	7.63
Jamaica.....	.69	.72	.54	.71	.55
Morocco.....	.34	.44	.48	.41	.35
Spain.....	.12	.18	.19	.18	.19
Trinidad and Tobago.....	.98	.80	.66	.50	.45
Total, 8 countries.....	7.42	8.22	9.19	10.40	10.55

1/ Weight of boxes: Oranges, 70 pounds; lemons, 76 pounds; grapefruit, 80 pounds.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research and related information.

Table 4.--Exports of citrus fruits to Europe, from principal countries competing with the United States, winter seasons 1963-64 to 1967-68 ^{1/}

Variety and country of origin	1963-64	1964-65	1965-66	1966-67	1967-68
	Million boxes ^{2/}	Million boxes ^{2/}	Million boxes ^{2/}	Million boxes ^{2/}	Million boxes ^{2/}
Oranges and Tangerines:					
Algeria.....	6.6	6.6	6.1	4.4	4.5
Cyprus.....	1.5	1.6	1.5	1.8	2.2
Greece.....	1.1	2.8	2.8	2.9	2.5
Israel.....	11.0	13.3	14.0	16.4	17.9
Italy.....	5.7	7.1	4.8	5.8	5.4
Morocco.....	14.3	13.2	13.8	16.1	18.9
Spain.....	40.3	34.0	40.0	39.0	32.0
Tunisia.....	1.0	1.3	1.0	1.4	0.8
Total, 8 countries.....	81.5	79.9	84.0	87.8	84.2
Lemons:					
Cyprus.....	.2	.2	.2	.3	.5
Greece.....	.9	1.4	1.2	1.8	1.2
Israel.....	.4	.3	.5	.5	.6
Italy:					
Winter.....	6.5	7.8	7.6	6.8	7.9
Summer ^{3/}	2.0	1.7	2.5	2.2	2.2
Total, Italy.....	8.5	9.5	10.1	9.0	10.1
Morocco.....	.1	^{5/}	.1	.1	.1
Spain ^{4/}	1.0	1.3	1.2	1.2	.9
Tunisia.....	.2	.2	.2	.2	.1
Turkey.....	.3	.1	.3	.5	.7
Total, 8 countries.....	11.6	13.0	13.8	13.6	14.2
Grapefruit:					
Algeria.....	.05	.04	.06	.03	.04
British Honduras.....	.03	.03	^{5/}	^{5/}	^{5/}
Cyprus.....	.31	.49	.56	.74	.81
Israel.....	2.01	2.46	2.97	3.51	4.26
Jamaica.....	.10	.06	.08	.05	.05
Morocco.....	.16	.13	.14	.12	.08
Spain.....	.06	.09	.09	.09	.09
Trinidad and Tobago.....	.15	.10	.15	.13	.06
Total, 8 countries.....	2.87	3.40	4.05	4.67	5.39

^{1/} Includes exports to the U.S.S.R.

^{2/} Weight of boxes in pounds: oranges, 70; lemons, 76; grapefruit, 80.

^{3/} June-September (Includes an unknown quantity of winter lemons.)

^{4/} Includes an unknown quantity of summer lemons.

^{5/} Negligible.

Foreign Agricultural Service.

from the previous season. In 1968-69 it is anticipated that 260,000 tons will be processed into about 13 million cases of canned Satsuma oranges (equivalent 48/11 oz. cans). Of this amount, an estimated 4.7 million cases will be exported, compared with 4.14 million last year. Recent history shows that more than 90 percent of Japan's exports of this item are usually destined for three countries - the United States, the United Kingdom, and West Germany. In the coming season an additional 85,000 tons of fresh Satsumas are expected to be processed into other products, mainly juices, a decline of 6,000 tons from 1967-68. Processing of summer oranges, mostly for juice production, utilized 48,000 tons or 19 percent of the total crop.

Morocco.--Despite a crop of generally good quality in 1967-68, plus record fresh exports, utilization of citrus by the processors remained at a high level. About 68,000 metric tons were processed, virtually the same volume as in the previous season. Of the total crop, 8.5 percent entered this outlet, versus 9.7 percent in 1966-67. Exports in 1967, the most recent year for which information is available, totaled 10,681 metric tons of single-strength juices and 1,565 tons of concentrate. This represented a 3-percent increase for single-strength juices but a slight decline in concentrate exports. Of the total shipments, orange juice accounted for about 78 percent of the single-strength and 82 percent of the concentrate with France and West Germany the principal importers.

Spain.--Processing activity has been on the increase in recent seasons, but the tonnage entering this sector remains far below that of Italy and Israel. About 217,000 metric tons of citrus were processed during 1967-68, a total slightly exceeding the previous year's level. The output from this increased tonnage was a record 49,900 tons of derived citrus products; 12 percent more than in 1966-67. Citrus juices accounted for 63 percent of this total, compared with 66 percent the past two seasons. Most of the remainder comprised citrus peel and pulp.

As in Italy, there has been an increasing trend toward production of citrus-flavored soft drinks. Output of lemon and orange-flavored soft drinks in 1967 was estimated at 210 million gallons, twice the level of 10 years ago.

Despite advice from some sources to concentrate on fruit suited for processing, or at least on dual-purpose varieties, production for the fresh market continues to completely dominate the industry and apparently will for some time. It has been estimated that about 80 percent of all new groves are planted to fresh-market varieties. Growers complain that yields are low for such varieties as Valencia Lates and are reluctant to expand production.

Exports of single-strength juices for the fiscal year ending June 1968 were 5,892 tons, versus 5,174 in 1966-67; shipments of concentrated juices were 4,715 and 4,920, respectively. The United Kingdom is by far the major recipient of Spanish single-strength juices, as over 80 percent of total exports were destined for that country during 1967-68. Spain sent about 54 percent of its exports of concentrated juices to West Germany in 1967-68 and about 19 percent to the United Kingdom.

Trinidad and Tobago.--During the 1967-68 season, 286,600 boxes of oranges and 442,982 boxes of grapefruit were processed, yielding 310,414 cases (24/A2's) of orange juice, 139,357 cases of grapefruit sections, and 308,153 cases of grapefruit juice. The drop in citrus production has caused the Citrus Growers' Association to postpone the relocation and enlargement of their processing facilities. The existing plant has adequately handled the past two crops and has a capacity exceeding the present level of fresh fruit production.

Exports totaled 2,412 metric tons of grapefruit sections in 1967, almost all destined for the United Kingdom. This country was also the leading customer for the shipments of 1.1 million gallons of single-strength grapefruit juice and 1.5 million gallons of single-strength orange juice.

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